

NUCIFORA CONSULTING GROUP

WICHITA TOURISM REVISITED

A REVIEW AND ASSESSMENT OF THE
IMPLEMENTATION OF THE CITY'S TOURISM
MASTER PLAN ORIGINALLY PRESENTED
AUGUST 2000

December 1, 2003

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BACKGROUND

Nucifora Consulting Group (NCG), author of the Tourism Master Plan (TMP) for the City of Wichita (presented August 2000), has been called upon to provide an update to the original plan by the City of Wichita, the Greater Wichita Convention & Visitors Bureau (GWCVB) and the Arts Council.

Specifically, NCG was asked to address the following issues relating to the City's tourism effort:

- A review and assessment of the GWCVB's/City's tourism performance to date vis a vis the recommendations outlined in the original Tourism Master Plan
- An assessment of the Aviation Festival, together with recommendations as to its future management and execution
- A review of the City's and the Bureau's cultural tourism efforts

METHODOLOGY

Operating data provided by the GWCVB and the City was reviewed. In addition, one-on-one and group interviews were conducted during the period August - November, 2003 with approximately fifty (50) influentials representing the following:

- Mayor
- City Council
- City Manager's Office
- Sedgwick County
- GWCVB Management and Staff
- Chamber of Commerce
- Arts Council
- Sports Commission
- Tourism Master Plan Committee
- Hotels
- Attractions
- Aviation Festival Planning Committee
- WFI
- Developers

SUMMARY STATEMENT

In the intervening 3-year period since its submission and acceptance, a hard-working and positive attempt has been made to implement the core elements of the Tourism Master Plan (TMP). While speed of implementation has been slower than expected, there is obvious proof of commitment to the Plan and genuine progress made in laying the foundations for future success. Both the City and the GWCVB have stepped up to the plate with respect to implementation. Both have committed time, energy and financial resources in attempting to address the Plan's recommendations. The same cannot be said of other organizations and parties which stand to gain from tourism's growth and success. The efficacy and success of those efforts have been limited because of a number of factors outside the control of the City and the GWCVB:

- There was an immediate need for leadership and staff changes in the GWCVB, together with a demand to revamp the organization and direction of the body.
- The impact of the 9/11 tragedy, coupled with the economic recession commencing in 2000, caused catastrophe for the tourism industry that was felt nationwide. Wichita was not immune to that impact.
- Changes in City leadership at a municipal government level have resulted in tourism development no longer being a top priority on the City's agenda. It is hoped that the industry's importance as an economic driver will be recognized and acted upon once the period of leadership change has been affected.
- Leaders and influentials within the City's business, political and civic circles have failed to comprehend the enormous potential that tourism possesses as an economic stimulus for the City and County; nor do they appreciate tourism's key benefit as a "clean" industry that delivers monetary benefit with limited infrastructural and financial demand upon the City and its citizens. Tourism is an industry that delivers heavy return on the investment.

ASSESSING THE IMPLEMENTATION OF THE TOURISM MASTER PLAN

(Refer to Pages 31-168 of the TMP for Specific Strategies and Tactical Elements)

A review of the recommended strategies and tactical elements contained in the TMP results in a number of observations about the future direction of the City's tourism marketing effort:

- There is still the unresolved issue of who "owns" tourism marketing...the City or the GWCVB. In line with its original recommendation, NCG contends that the GWCVB must take the leadership in setting strategy and accepting responsibility for the ultimate development and successful growth of the travel,

tourism and hospitality industries in Wichita, as well as for the constituents that those industries represent, e.g. hotels, attractions, dining, retail, etc. The City and County must continue to be actively involved as committed partners with the GWCVB as well as maintain an obligation to support the Bureau financially and operationally where appropriate (with accountability provided by the Bureau in return).

- The issue of the City's tourism "positioning" remains unresolved. As will be referenced later in this report, NCG believes that neither aviation nor western heritage provides the singular, all-embracing core theme/image on which the City's marketing efforts should be based. NCG still believes that Wichita should package and sell what it possesses and what it's good at...world-class attractions, superior regional retail shopping, eclectic dining, and a variety of accommodation alternatives.
- The industry (including the GWCVB, attractions, hotels, restaurants, supporting organizations, etc.) has done an ineffective job of packaging its product to its regional target audience. There is also a need to continue and expand regional marketing activity and partnering with other Kansas markets (with compatible, yet non-competitive appeal) to promote the region to out-of-state visitors.
- The industry has failed to aggressively promote the value and significance of travel, tourism and hospitality, as a long-term economic force, to the City's leadership and citizens.
- The original TMP strategy which called for marketing the City to a regional target audience within a 3-5 hour driving radius (4 million potential) remains viable given the travel and tourism trends resulting from the 9/11 tragedy. As Americans took to their automobiles to travel and have been slow to return to the airplane, enormous opportunity exists for drive-appeal markets like Wichita to capitalize on that dramatic shift in travel habits.
- Major emphasis should still be placed on the leisure visitor given the deficiencies in the City's convention product and the obstacles that are placed in the way of marketing to what is now a highly-competitive marketplace, e.g. air travel cost, lack of concentration of Downtown hotel rooms, etc.
- The existing strategy for promoting sports is successful and should be continued without pause. Some investigation should be given to developing a NASCAR product given the burgeoning growth of the sport and its demographic relevance to the marketplace.
- The "What's it to you?" campaign was a vital first step in raising consciousness about the appeal of Wichita and addressing the issue of citizen self-deprecation. The campaign was under-funded but successful in spite of that fact. Unfortunately, there has been limited follow-up, and much of the supplementary, grass-roots tactical support has not been executed (see the TMP pages 105-123). The Mayor's current program of billboard/bus media support

aimed at communicating a positive message of belief, recognition and aspiration about the City is an ideal example.

- More attention needs to be paid to immediate improvement and expansion of the Century II Center, in addition to the construction of an additional 500+ room hotel in the Downtown area in close proximity to the convention district.
- The City is sorely lacking a transportation loop, linking attractions, for the ease and mobility of both leisure and convention visitors. It should be noted that competitive cities have made the implementation of such loops a top priority in their product development efforts.
- No positive action has been taken in revamping the air museum. A commitment needs to be made to develop the product to its true potential or close it.
- The arrival of AirTran as a low-cost carrier has been an unquestioned boon to the City's marketing effort. Economic incentives must continue to be provided in order to maintain the airline's servicing of the City. These incentives must also be supplemented by stronger citizen support of the airline.
- Cosmetic improvements have been promised to Mid-Continent Airport, but are still lacking. As the entry portal for the City, the airport does little to establish a welcoming personality that is representative of Wichita and its people.
- More effort must be made to exploit the medical visitor marketplace as part of the City's marketing effort (with an estimated 1.25 million out-of-market visitor patient trips annually).
- Existing promotion of the Old Town area must be continued and fortified. Similarly, the establishment (and promotion) of a Chisholm Trail marker must be made a priority.
- There should be more aggressive promotion of the City's restaurant and dining product (see TMP pages 100-102).
- There has been insufficient marketing of the river and utilization of its public areas as event locations.

ASSESSING THE GWCVB

The Bureau can claim success for a number of important initiatives that have been successfully executed during a period of exceptional turbulence for the organization and the industry including:

- Implementing and recovering from major change in management, staffing, operations and direction.
- Developing a new sense of energy, revitalization and commitment about the Bureau and its mission.
- Successfully rebuilding relationships with key partners.
- Forming a hotel/lodging council.
- Developing advertising and marketing campaigns involving thematic broadcast advertising.
- Instituting a new golf initiative in partnership with the City of Wichita.

While the Bureau has been justifiably successful in meeting its forecasts, it has been less successful in driving aggressive increases in visitor traffic. However, this performance shortfall must be placed within the context of an overall malaise within the travel, tourism and hospitality sectors, resulting in a limited increase in the total number of domestic travelers in 2002 and 2003. Data reveals:

- Leisure visitation nationally, which has been fueled primarily by day-trips, has risen 8% since 2000 (up 1.3% in 2002) and is now beginning to return to 2000 levels.
- Business travel began to slide in 2nd and 3rd quarters of 2000...a decline which has continued through 2003.
- Convention and tradeshow delegate pick-up and length of stay declined in 2001 and 2002.
- The largest declines in business travel were evidenced in the corporate group/meetings marketplace, which is not projected to recover until 2004 or later. Associated with that trend, has been the further reduction of transient overnight trips and fewer air trips in order to lower business cost.

There are a number of areas in which the GWCVB must focus its efforts in order to perform more effectively and satisfy its charge as the City's marketing arm:

- It should be reiterated that now is the time for performance and results. The Bureau's members are demanding an even more aggressive marketing approach which translates to more leads, more conventions, more visitors and more accountability. The GWCVB must take clear responsibility for driving the City's tourism marketing effort.
- Bureau performance must continue to be tracked and reported in a disciplined manner. Metrics and accountability must now be the Bureau's mantra. The performance of every program/campaign must be tracked for ROI, e.g. Visitor

Center traffic. There is also a concomitant need for continued accountability reporting by the Bureau to its Board and City Hall...but more of it.

- The Bureau needs more funding beyond its current \$1.8 million budget. Given the decline in TGT (transient guest tax) and the current pressures on the City's budget, consideration should be given to implementing a tax on food and beverage and/or car rental in order to support a needed budget increase.
- The GWCVB must emulate the practice of competitive bureaus and develop top prospect meetings and conventions "hit list" based on prospect potential and appropriateness to the Wichita marketplace.
- The Bureau needs to assuage the concerns of its members by recording a number of immediate iconic victories, specifically by landing large city-wide conventions for 2004 and beyond, e.g. National Forensic League in 2006 (12,700 attendees), National Square Dance Association in 2008 (8,000).
- Under the Bureau's new leadership, there has been a heightened focus on soliciting outside groups and influentials, particularly those associated with the group business and laudably so. This strategy must be optimized even further:
 - More effort should be made to bring FAM trips to town, representing travel writers and group tour coordinators. The emphasis needs to be on both quantity and quality of FAM visitor.
 - The Bureau must develop a more aggressive approach to motor coach and group tours, both of which have experienced a recent decline in business. The City's shopping, festivals, culture, western heritage and aviation themes need to be more heavily promoted.
 - A major opportunity exists to book the smaller, but profitable, religious, military and fraternal organization meetings which seek a cost-affordable alternative to the larger, more expensive convention cities.
 - The Bureau must take the leadership in packaging Wichita's product – its cultural tourism, events, attractions, dining, retail, etc. As an example, the new golf initiative must be better marketed with hotel packages, tie-ins to the aviation manufacturers, FAM trips for golfing publications, association with the PGA (if possible) and better reporting of metrics, e.g. how many tee-times booked on-line.
 - As referenced earlier, the Bureau must be more aggressive in promoting to the motor coach and group tour sectors. Solicitation of ABA and NTA targets, in addition to Glamer is advised.
- The hotel and attractions communities are feeling the pain of declining counts and reduced revenue. The Bureau must work harder in understanding the

pressures being felt by these two important tourism constituencies, communicate more effectively with both groups and determine how they can be best supported during the current downturn.

- The GWCVB must be prepared to take a stand with respect to advocacy issues where they have a bearing upon the tourism industry, e.g. WaterWalk, casino gambling, Downtown arena.
- The Bureau is advised not to get involved in the execution of events unless it's on a "last resort" basis. The Bureau's role is to encourage, support and promote an events strategy, but not be responsible for their execution.
- In the absence of large advertising support budget, there must be a heavier emphasis on PR strategy and execution (see the TMP pages 127-129).
- Excellent work has been done in developing the www.visitwichita.com web site, but efforts need to be made in acquiring higher search engine rankings (currently number 12 on Google).
- The Bureau's corporate fundraising program requires more effort. Although corporate giving has significantly declined nationally during the last 3 years, the Bureau must look to the corporate marketplace as a source of major funding in its future years.

FESTIVALS AND EVENTS

An events strategy still makes sense for Wichita given the City's lack of a unique and identifiable image and heritage, e.g. Orlando, San Francisco, New Orleans. With that in mind, a focused events strategy can be responsible for generating significant incremental visitation (1 million) on the part of regional visitors who, in turn, will sample the City's attractions and tourism facilities. It is suggested that the events strategy could be executed as follows:

- Build around four themes annually...aviation (air festival), western heritage (Delano Days), home town (River Festival/Chili Cook-Off/BBQ), and trading (Rendezvous Flea Market). The four events can also be scheduled for seasonal compatibility.
- Ideally, WFI should manage the events strategy (economy of scale, effective use of volunteers, integrated solicitation of sponsors, repository of knowledge and experience). In reality, two or more organizations will most likely be required to plan and execute the events on a professional basis. WFI may lack the resources (manpower and funding) and commitment required for a six-time, event commitment.

- The events strategy calls for strong financial and resource support from the City, County and GWCVB in addition to a stronger commitment from the media and corporate sectors.
- The events planning groups must be professional and passionate, and work with experienced consultants where new ground is being broken, e.g. Rendezvous.

AVIATION FESTIVAL

Wichita must build on the success of its recent 2003 Aviation Festival. Going forward, the Festival will require resource support and management enhancement in the following areas:

- The Festival must be placed in the hands of a professional management group, working with aviation consulting assistance.
- There is a need for both the City and the County to provide seed money during the Festival's critical development phase (1-3 years).
- The community focus must be maintained. The success of "Plane Crazy" should be acknowledged and built upon in future years (with the planes more heavily promoted and given more prominent exposure).
- There must be more involvement from the City's aviation community, particularly the manufacturers.
- The Festival has opportunities to garner important revenue from merchandising sales and more committed corporate sponsorship.
- There must be more national media coverage in the aviation trades and broader regional media coverage in consumer travel publications. Local media must continue to support the Festival as a civic responsibility and as support for market development.
- Ultimately, the Aviation Festival must aspire to be one of the top 3 air shows in the country along with Oshkosh and Dayton.

INTERGRATING AND PACKAGING CULTURAL TOURISM

Wichita has a rich arts and cultural heritage and every effort should be made to promote and exploit this natural resource from a tourism perspective. It should be noted that arts

and culture within this context is defined as the City's essence...its people, history, music, food, and personality, in addition to its traditional arts, e.g. museums, performing arts.

The disappointing news is that not enough is being done to market a fine cultural product, in contrast to competitive cities that are aggressively pursuing the cultural tourism dollar. Cultural tourism remains important to Wichita because of the spending power of its consumers and the economic leverage that cultural tourism provides. Nationally, cultural visitors/tourists spend \$22.87 per person/per event; \$38.05 for out of town visitors.

The City's cultural tourism effort can be strengthened with implementation of the following:

- The work of the current Arts Council must be vigorously supported. The Council itself must develop an integrated, long-term plan for marketing Wichita arts and culture in order to grow attendance and prepare for the day when public funding is curtailed, as it inevitably will be. Both the Arts Council and the GWCVB must assume a greater responsibility for promotion.
- There must be greater frequency of blockbuster events/exhibits and joint-promotion around common themes and events with co-op media support.
- Training in marketing, promotion and management is still a necessity for most of the smaller organizations.
- Weekend tour packages including admission fee, hotel accommodations, and dining, must be assembled and promoted.
- A trolley loop linking attractions and museums must be implemented.

For additional tactical recommendations see the TMP pages 96-99.

DOWNTOWN FESTIVAL ACTIVITY

There is an obvious need to attract more people Downtown in order to justify the \$150 million that has been spent in revitalizing the area by public and private sectors during the last 13 years. Without a strong Downtown, Wichita will never satisfy its goal of being one of America's 10 Best Cities.

The year-long events strategy calls for utilization of Downtown areas in order to capitalize on the attractions that reside there, as well as the exceptional facilities that exist near the river front and adjoining locations.

The City, in return, needs to provide "relief" in terms of traffic control, transportation and policing in order to relieve resource pressure on events and festival management.

WATERWALK

The river is a significant, yet under-utilized asset for the City and its Downtown and must be exploited more effectively as part of any tourism marketing effort. For that reason (and if the revitalization of Downtown is to continue), the WaterWalk project requires serious consideration and support as long as it does not constitute a heavy financial drain on the City's tax base. In that light, consideration should also be given to the formation of a TIF district to finance the project.

Extending the canal from the river to Old Town is advised in order to provide much needed linkage between these two under-exploited locations and spur further development of the Downtown area..

THE ARENA

There is a demonstrable need for a Downtown arena in order to attract sporting events, concerts and conventions that demand arena capabilities. The existing Coliseum is limited in terms of size, location and construction. Any additional spending on that facility should be restricted to change required for ADA compliance.

A detailed feasibility study needs to be conducted on the construction of a Downtown arena. Assuming that such a study supports the proposal, there needs to be more City/County cooperation to resolve the issue of long-term viability and use of the Coliseum.

It should be noted that major cities have invested heavily in arena facilities in order to bolster visitation to their downtown areas. Wichita should not be an exception to the trend.

URBAN DESIGN ISSUES

From a tourism vantage point, more clean-up is required of the Downtown area. Surface parking lots create vast expanses of emptiness and discourage pedestrian activity. They are eye-sores for citizen and visitor alike. The same criticism applies to vacant Downtown buildings and boarded storefronts. Some effort, preferably headed by the City and the Wichita Downtown Development Council, must be made to provide visual/cosmetic coverage, or find a way to convert these buildings to 24/7 use via tax incentives.

WESTERN HERITAGE

There has been much discussion about the growing importance of western heritage as a visitor draw for Wichita, particularly for motor coach groups, foreign visitors and conventions. While there is an appreciation of the value and importance of this heritage, NCG believes that it cannot constitute the City's singular positioning. Western heritage as a theme is too limiting and lacks uniqueness given the competitive choices that exist in the region, e.g. Dodge City, Oklahoma City, Fort Worth.

There is, however, a genuine need on the part of the GWCVB to continue its current efforts to build western heritage tourism. To that extent, an integrated marketing effort must combine the City's western "product," including Cow Town, Prairie Rose Chuckwagon Supper, Delano Days, WAM's Charles Russell Gallery, Mid-America All Indian Center, The Chisholm Trail and Shepler's.

Consideration should also be given to promoting, even more aggressively, western heritage from a regional viewpoint with linkage to Dodge City, Abilene, Lawrence, Elswood and Caldwell (the Western Alliance).

OTHER CONSIDERATIONS

- The City currently grants an approximate \$5 million annually to not-for-profit organizations and attractions (not including the GWCVB). The question remains, can the process be made more accountable and what standards should be set in place to control the grant process? Consideration should be given to the formation of a Grant Dispersal Board that establishes the rules, allocates the funding and demands a quid pro quo for the investment, e.g. any recipient organization must agree to participation in communal marketing programs.
- Serious consideration must be given to the issue of casino gambling which can no longer be ignored as both a revenue generator and a viable attraction to the visitor. There is, however, a question as to whether or not gambling as a concept is antithetical to the values of Wichita and mid-America.
- The City's attractions must take greater responsibility for self-promotion, boosting of attendance and repeat visitation. More effort must be made on packaging (e.g. attractions pass), more aggressive promotion, co-op advertising, linked web sites, joint thematic programming, etc.
- The City's hotel community has been the worst victim of the current tourism downturn. The community needs to fill beds, but is clamoring for a wider marketing effort to the outlying city areas, a more aggressive posture from the GWCVB and closer ties to the Sports Commission in order to capitalize on the success of that body.

- There is a commonly expressed viewpoint that a potential vacuum is forming with respect to the City's future development, particularly as it affects the travel and tourism industry. With a number of major development issues currently under investigation, e.g. Downtown arena, WaterWalk, casino gambling, Old Town, there is call for a person, organization or entity to step out in front to define the vision and lead the charge.
- Tourism marketing impacts the broader Wichita metropolitan area and is not confined solely to the City. For that reason, Sedgwick County must play a more prominent and committed role, including financial, in partnering with the City to promote what is still an unexploited tourism industry and product.
- The City should continue its current strategy and philosophy of supporting aesthetic improvement in the Downtown area, specifically in the areas of public art, landscaping and streetscapes.